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Wealthtech Weekly

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By Rob Burgess
Reporter

As more and more advisors have discovered, standing out from the pack often involves offering more holistic, family office-style services.

In the latest edition of "Show Me Your Stack," Kyle Johnson, owner and senior wealth advisor at Link Wealth Strategies in Topeka, Kansas, said he collaborates with strategic partners including tax professionals and certified public accountants, providing back-office investment support for the tax clients of four associated firms.

I hope you'll check out these articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Tax tech as a differentiator: Show Me Your Stack

Kyle Johnson, owner and senior wealth advisor at Link Wealth Strategies, uses tax planning software to help set his firm apart.

- **Expanded offerings draw prospects, advisors say**
  Whether by partnering with outside professionals or gaining additional certifications or qualifications, advisors have been adding guidance on insurance, health care, taxes, estate planning and more.
- **Advisors affiliated with broker-dealers most likely to leave**
  Lack of freedom and limited investment choices may be driving advisors at broker-dealers to leave their firms this year.

- **Impact investors push human capital in lieu of DEI**
  Despite a flurry of executive orders targeting renewable energy, fossil fuels and environmental policy, advocates say many companies and countries are continuing ESG and DEI initiatives. But they might not be calling them that.
- **How advisors are approaching digital marketing in 2025**
  Firms are deploying new tools to create campaigns and track how effective their marketing spending is, but the core concept of connecting directly with clients and prospects on a human level hasn't changed.

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